

# fundraising research



## helping you grow your funding streams

Have you found all your potential donors? Are you asking your current donors for the right level of gift? Action Planning's Research Team can help you to identify new sources of funding. We help organisations successfully raise funds from trusts, foundations, statutory bodies and individuals by identifying and prioritising prospects.

[more overleaf >>](#)



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strategy and fundraising consultants

# fundraising research

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How well do you know your potential donors? Do you know who they are, or what motivates them to give? Growing your income effectively relies on quality research to identify, understand and prioritise donors.

## Action Planning's Research Team help charities identify potential donors including:

- UK Trusts and Foundations
- Landfill Tax Funders
- Lottery
- US and International Foundations
- Statutory Grant Schemes
- Statutory Tenders
- Multilateral and International Funders
- European Union Funding
- UK and International High Net Worth Individuals

Action Planning, with our partners Prospecting for Gold, can also help you identify current donors who may be able to give additional major gifts, or leave you a legacy:

- Wealth Intelligence, the UK's largest database of potential major donors, contains details of 240,000 individuals who own more than £1m in assets excluding their current residence.
- Legacy Intelligence, the first UK database using factual information rather than modelling to identify 330,000 potential legacy donors based on age, property value of over £500,000 and ownership.

We can match your database against Wealth or Legacy Intelligence to identify current donors who are in a position to significantly increase their giving, or leave you a legacy.

As a full service consultancy to the not-for-profit sector, Action Planning can assist you to make best use of our research through advice, training, mentoring or implementation. For more information on our research, fundraising, bid writing or strategic support please visit [www.actionplanning.co.uk](http://www.actionplanning.co.uk) or call 020 8642 4122.

"The staff at Action Planning have been instrumental in providing the key links and knowledge that have facilitated and guided our success. They have been a pleasure to work with and made the challenge of raising over £4m fun."

**Ken Mackenzie, Project Manager, London's Arcadia**

When I became overwhelmed with the workload required to complete just one application to English Heritage I persuaded our congregation that it was worth my sanity for them to invest .... to get help from Action Planning to raise £728,000.

To be honest we were all a bit dubious about how successful the investment .... in Action Planning's help would be but we were pleasantly surprised.

So pleasantly, that we invested even more money to receive additional help with more applications as the first round had been so successful in raising funds. Our congregation were amazed how quickly we managed to raise the necessary funds for our £728,000 restoration bill"

**Malcolm Booth, Treasurer, Trinity Church, Sutton**

## examples of our work

**Barnardos** - legacy Intelligence screening to identify potential legacy prospects

**Berkshire, Buckinghamshire and Oxfordshire Wildlife Trust** - wealth Intelligence support for major donor development

**British Council** - identifying high net worth individuals, companies, statutory funders and foundations across 15 Middle Eastern and North African countries.

**Cancer Research UK** - wealth Intelligence screening to identify high net worth individuals

**Canterbury Christ Church University** - identification of high net worth individuals amongst former alumni

**Day Care Trust** - identifying American, Australian and New Zealand foundations

**East and North Herts NHS Trust** - fundraising research to support a capital campaign and database screening

**Fairtrade Foundation** - research into potential multilateral funders

**London's Arcadia** - research and bidwriting to support a capital campaign

**London Symphony Orchestra** - wealth Intelligence screening to identify high net worth individuals amongst patrons

**National Trust** - identification of high net worth individuals

**Toynbee Hall** - identifying potential trust, corporate and statutory prospects

**Trinity Church Sutton** - research followed by bidwriting into trusts and landfill tax funders

**UCB** - Wealth Intelligence screening to identify high net worth individuals